



As City Administrator, I am guiding the shift for staff to focus support the Strategic Plan's S.T.A.I.R.S. (S=Stewardship, T=Teamwork, A=Accountability, I=Innovation, R=Respect, S=Stewardship/Fiscal Responsibility) Core Values as we are trying to:

1. Shift staff focus on the City's Core Values in ALL city processes, actions & operations
2. Drive the City's Mission to steer toward the City's Vision
3. Provide Support to the Strategic Plan's Focus Areas & Goals
4. Improve and Innovate services provided to residents
5. Ensure tighter Fiscal and Process Controls
6. Encompassing Diversity, Equity, Inclusion and Belonging in all city Core Values, actions & operations
7. Create a "Gold Standard" in Operations
8. Make the City an "Employer of Choice"

In my role as City Administrator, I have worked transparently and diligently to create synergies among our departments to improve services, efficiencies, cost savings and morale. After decades of limited interactions between departments, I am helping manage the city staff as a cross-functional team to while implementing numerous long-overdue technology improvements. My background includes a LEAN Six-Sigma Blackbelt certification. (LEAN-a system of techniques & activities for operations to eliminate non-value-added activities & eliminate waste from the business). I have worked assiduously to create new relationships and mend old partnerships with multiple city businesses and their leaders to support growth within the City.

Listed below please find reference to the accomplishments which I have guided my staff to achieve. Our progress is representing some of the most significant internal and external achievements in the City's recent history.

July – December 2020-Accomplishments

1. Met all employees, in all departments on all shifts – literally, physically
 - a. Promote long-overdue cultural changes
 - b. Empowering employees to provide better service, seek positive, proactive changes
 - c. Promote our "Course Correction" showing the change for the future
 - d. Eliminate the 'Status Quo' mentality – let staff know they have a voice
 - e. Prelim whistle blower policy setting "If you see something, say something"
 - f. Declare City officially Open for Business by working with businesses to provide support which was previously lacking and/or sporadic
2. Investment in Employees
 - a. Re-aligning employee work focus to support the Strategic Plan's S.T.A.I.R.S. (Service, Teamwork, Accountability, Innovation, Respect, Stewardship-Fiscal Responsibility) Core Values
 - b. Collaborative Job Description revisions to accurately reflect duties performed
 - c. Develop positions goals and personal development goals
 - d. Expand employee training, collaboration & team building



- e. Improve communication & synergies between departments
 - f. Annual Employee Survey form revised
 - g. Finance & Human Resource Departments' realignment
 - h. Provided 1st Employee picnic with 100% participation (14% prior)
 - i. Audit & document decades-old or non-existent policies & procedures
 - j. Identify segregation of duties to provide checks & balances
 - k. Provide direct support for Munis Version 2019 upgrade – most recent upgrade in 2017 to Munis Version 11.3. Support for 11.3 expired on 12/31/2020.
 - l. Establish cross-training protocols
 - m. Provide coaching & mentoring opportunities
 - n. Help employees develop within their positions
 - o. Outline career paths for those employees desiring future growth
 - p. Ensure healthy work environments – implement Go365 interactive wellness plan
 - q. Initiate core “LEAN” Team to begin process improvement & save taxpayer dollars
3. Investment in Business Infrastructure
- a. Information & Business Systems assessment completed
 - b. IBMi (AS400 DOS-based mainframe computer system) migration planning for outdated systems – 60% of cities business operations completed on this 30+ year old system.
 - c. Provided professional Project Management for Business & Info Systems upgrade (Baecore).
 - d. Provided additional laptop computers to promote working access during pandemic
 - e. Virtual connectivity for Municipal Court & numerous conference rooms throughout city facilities
 - f. EAM (Enterprise Asset Management) Software exploration – future 5% data reduction from IBMi (AS400 system)
 - g. Begin active management of Loan program – not actively managed in 30+ years
 - h. Neighborly Loan software implementation – collaboration between Development & Finance departments. *Important note: The City's Loan program was operating in two computer systems, with no management, oversight & reconciliation. Loans decades old were unpaid with no penalties/fees assessed and/or collection attempts made. This problem was costing the City tens of thousands of dollars of lost revenue annually. Neighborly Loan software contains an external user interface; now both departments and the customer have access to the loan information as the loans are now actively managed.*
 - i. Creation of Munis upgrade test scripts (internal Munis Procedures) were documented and completed in preparation for the upgrade.
 - j. Microsoft (MS) Office upgrade – began for completion over 2-year period. Phase 1 completed during Spring 2021.
 - k. Covid 19 Business infrastructure upgrades
 - i. New computers & connectivity to support remote work access when/where applicable
 - ii. Safety-related upgrades



- iii. Enhanced cleaning protocols to protect employee/visitor safety
- iv. Disinfectant fogging machines purchased & utilized
- v. Filters for improved internal air quality installed
- l. 2021 Budget
 - i. Provided additional Tax Levy support to Library Operations
 - ii. Completed fiscally-responsible budget during health pandemic with unanticipated key leadership change mid-year
 - iii. Maximized closure of TID 11 (Tax Incremental District) & ERP (State of Wisconsin's Expenditure Restraint Program)
 - iv. At the request of the 2020-2021 Common Council, left behind unused Tax Levy for minimal tax increase
- m. Human Resources Department Restructuring
 - i. Process-Procedures review
 - ii. Benefit update & audit
 - iii. Staff changes – additions
- n. Fire Department Contract Negotiations tentative agreement for a 3-year reached December 2020
- o. Process & Control auditing
 - i. Reviews began in 2020
 - ii. Many non-existent processes/controls not reviewed for decades
 - iii. Streamlining & strengthening controls
 - iv. Establish an approval process to vet separation of duties.
- p. Finance Department restructuring
 - i. Audit & document processes & procedures
 - ii. Implement efficiencies (LEAN)
 - iii. Mentorship with a consultant
 - iv. Staff changes/additions

2021 Accomplishments

- 1. Finance related
 - a. Oversee efforts to streamline processes, manage clean-up efforts, strengthen financial controls, establish policies and procedures noted as missing/inadequate per 2020 & 2021 CLA Studies related to Finance and HR Departments
 - b. Hired Baker Tilly as new audit firm after decades with CLA
 - c. Policy Creation and/or Update including; Fund Balance, Tax Incremental Financing, Code of Ethics
 - d. Consolidate internal "monthly" charge entries to "annual" – 2,148 entries reduced to 79, savings of 22 work days, or \$7,700 annually, per staff completing the task
 - e. Streamline Accounts Payable (AP) check-runs from weekly to semi-monthly – improved cash-flow management
 - f. Cross-training for Finance & HR staff for efficiency, continuity and separation of duties.



- g. Begin active management of Accounts Receivable (AR Aging not managed prior) – notably Delinquent Personal Property Tax Penalty payments (2021 Budget=\$4,000 / 2021 Actual=\$37,700, 942% increase)
- h. Ambulance rates updated – 1st time in 13 years
- i. Implemented a collections agent to managed the city's delinquent AR accounts
- j. AP vendor transfer from checks to ACH payments (Automated clearing house) – 66 vendors initially transferred, \$55 total print/handling cost per check vs. ACH payment \$0.05 cost per payment; 1,000 fewer checks, \$55,000 annual savings plus significant time savings for Finance staff
- k. AP Vendor information packet – fillable PDF (Portable Document Format) forms for electronic submission now available on City website
- l. AP Vendor virtual credit card rebate implementation – potential \$40,000 annual rebate
- m. Introduction of check scanning software – reducing staff time & expenses associated with daily bank deposits
- n. Auto insurance deductible increase from \$1,000 to \$2,500 = \$19,300 annual savings (historical average of 3 claims per year with average cost of \$2,100 per claim)
- o. Monthly “close” for financial accounts – beginning January 2021 – never “closed” monthly in the City's history – monthly close & “tie-out” completed from January-June 2021
- p. Annual close completed March 15 – 3 months earlier that historical June-July close
- q. Development of long-term General Obligation (GO) debt management plan
- r. Updated the City's Long-Term Investment policy, which dated back to 1995, with the most recent update in 2011
- s. City's Long-Term Investment funds review & update completed
 - i. 1st update in over 5 years
 - ii. Established ongoing periodic review process
- t. Reaffirm Moody's Aa2 rating with positive commentary regarding the City's new GO debt management plan
- u. Adopted 2022 Capital Improvements Program (CIP) with less than \$2 million GO debt related projects.
- v. Hired experienced municipal Finance Director
- w. Began creation of the City's first 5-year Fiscal Strategic Plan with Ehlers, Inc. to better manage valuable financial resources and maximize the plan & management of TID closures for the City's future CIP needs.
- x. Arrange for the City's 5-year revaluation with Grotta Appraisals– City's equalized to assessed ratio was non-compliant for 5 consecutive years
 - i. Phase 1 of 5 implemented in Q4-2021
- y. Employee Life Insurance reconciliation and Retiree Health Insurance audit completed (1st time comprehensive reviews ever in city's history) and ongoing audit implemented; 12 ineligible participants removed from the plan
- z. Utilizing Baker Tilly Recruitment Services for HR Director Search



2. Employee-related

- a. Initiated mandatory employment practices liability training sessions
 - i. Initiated and completed annual Anti-Harassment Training for all staff
 - ii. Initiated and completed ADA (American Disability Act) FML (Family Medical Leave)-WC (Workers Compensation) training for all managers, supervisors, time-sheet approvers
- b. 10 city employees completed the Lean Government Training – 13 total city employees educated
- c. Began Carlson-Dettmann compensation study – Job descriptions questionnaires completed by employees as part of the review process
- d. Non-represented employee handbook under review – 1st update in 6 years
- e. Increased staff participation at Munis conference by 400%
- f. Expanded annual Munis direct training (PACE) program capacity by 66%
- g. Wellbeing Committee restructured
- h. Implemented Go365 Program for health insurance participants
- i. Reinstated health screen (physical exam) for insurance discount
- j. Continued annual employee HSA Contribution (\$750/\$1,500)
- k. Initiated city's internal education program to support DEIB in the workplace
 - i. Creating & Sustaining Authentic Relationships in the Workplace (all employees)
- l. Increased training & professional development in 2022 Budget by \$40,000
- m. 2021 Employee Holiday gifts completed

3. Business infrastructure related

- a. Completed Munis version 2019 (v2019) upgrade within 4 months and on schedule – at upgrade, 477 users converted, 1,035 remain
- b. Planning for next upgrade, fall 2022
- c. MyCivic electronic community information & engagement platform project approved
- d. Enterprise Fleet management program initiated - \$1 million savings in GO debt for 5-year program
 - i. 1 of 47 statewide entities participating in program
- e. IBMi (AS400) – 40% data reduction
 - i. Parking Stall Rentals & billing moved to Munis
 - ii. Code Enforcement & Permitting moved to Munis
- f. EAM planning/software implementation underway (DTSVueWorks)
 - i. Savings of \$1 million in GO debt for the 5-year CIP program
- g. Neighborly loan program fully implemented, integrated & managed collaboratively by the Finance & Development departments. Neighborly Loan Program online applications implemented – Prior-state (In-Person only applicants) = 5-7 annually; Current state (Online or In-Person applicants) = 50 annually; 714 % increase
- h. MS Office upgrade Phase 1 (version 2010 to version 2019) completed for all servers and computers



- i. AT & T phone line consolidation audit completed; 36 unused lines cancelled = \$9,000 annual savings
- j. New equipment secured
 - i. Fire-Rescue Pumper Truck
 - ii. Ambulance
 - iii. Initiated South lakeshore sewer project
 - iv. Multiple wastewater treatment plant upgrades
 - v. 10 new Fixed-route transit buses
 - 1. In 2019 fleet = 75% past useful life
 - 2. 2022 deliveries = 0% past useful life
- 4. Strategic Plan related
 - a. Strategic Plan extension from 2021 through 2022 in process
 - b. Utilizing professional Strategic Planning services to properly engage residents for direct input (Baker Tilly)
 - c. Build upon Focus Areas with the addition of Diversity/Equity/Inclusion/Belonging
 - d. Completed the City's membership to GARE (Government Alliance for Race & Equity) for additional resources, ideas, support
 - e. Promoting Sheboygan as a premiere community – both business & residential
 - f. Housing Advancement strategy
 - i. Creative advancement of housing study
 - ii. Senior housing-option exploration
 - iii. Single family housing development
 - iv. Multi-family & Veterans housing options
 - g. Business Advancement strategy
 - i. Small Business Emergency Assistance Program – COVID-19 Relief Grant Program
 - 1. ARPA funds up to \$10,000 per business with less than 20 employees

2022 Accomplishments (January – November 3, 2022)

- 1. Finance related
 - a. Continuation of process streamlining, oversight of management of clean-up efforts, strengthen financial controls, establish policies and procedures noted as missing/inadequate per 2020 & 2021 CLA studies related to Finance & HR Departments
 - b. Munis Chart of Accounts conversion completed
 - i. 13,800 accounts reduced to 3,600
 - ii. Now in proper alignment with state & federal reporting requirements
 - c. Completion of city's first 5-year Fiscal Strategic Plan with Ehlers Public Finance Advisors, Inc.
 - i. Improved strategic management of valuable financial resources, maximize the fiscal program and timing of TID closures
 - ii. Extending TID closures by 1 year to maximize funding for housing development expansion



- d. Gropa Appraisals Re-Valuation – Phase 2 of 5 underway
 - i. Bringing city into compliance with State Department of Revenue (non-compliant since 2018)
- e. Reaffirm Moody's Aa2 rating
- f. Tyler Payments Credit Card processing module implementation approved & in-process
- 2. Employee-related
 - a. Continued annual employee HSA Contribution (\$750/\$1,500)
 - b. Mandatory employment practices liability training sessions
 - i. Initiated and completed annual Anti-Harassment Training for all staff
 - ii. FLSA Overtime Training for all Managers-Supervisors-Time Approvers
 - c. Leadership Development Training program implemented
 - i. 40 managers/supervisors – 4 sessions completed
 - 1. Leadership: People Skills
 - 2. Inclusivity for Leaders
 - 3. Coaching & Performance Feedback
 - 4. Succession Planning
 - ii. Emotional Intelligence Training (5 sessions) beginning Nov 2022
 - iii. Optional training for Management Team
 - 1. Microaggressions/Macroaggressions training
 - 2. Intersectionality Q & A
 - 3. Uncovering Myths About Disability training
 - d. Expansion of DEIB employee education
 - i. Leading Change – DEIB The Foundation
 - 1. Sep – Oct 2022
 - 2. All-employee training
 - e. Employee Evaluations Revisions
 - i. 2022 Form modified to include DEIB-related measurements
 - ii. Clear instructions on completion of self-evaluations provided
 - iii. Spanish translated document available
 - f. Cross-functional team attended Veterans Summit – Q3
 - g. Tyler-Munis Annual Conference
 - i. Largest representation – 8 staff from 4 departments
 - h. Carlson-Dettmann Compensation Study
 - i. Completed & implemented Q3
 - i. Flores & Associates – FML & ADA 3rd Party Contractor implemented for employees
 - i. Improved process & confidentiality
 - j. Employee Handbook & Policy Update
 - i. In process
 - ii. Inclusivity considerations
 - k. Employee Educational Opportunities implemented:
 - i. EAP Info Sessions completed at 2 city buildings
 - ii. Active Shooter Training at City Hall
 - iii. Fire Drills & Tornado Drill completed



- iv. 457 Plan Employee-Advisor individual meetings completed & in-process
 - 1. 1st meetings since 2018
- v. Fire Extinguisher & AED Training – planning for 2023
- 3. Business infrastructure related
 - a. Munis 2021.3 upgrade completed – Aug 2022
 - i. 2021.4 upgrade scheduled – Nov 2022
 - b. FortiClient upgrade & Darktrace Antigena Email Filtering – Q3
 - c. Shoreline Metro HotSpot mobile app implemented – digital fares & payments
 - d. New Harbor Centre Express Trolley received
 - e. MyCivic/Tyler 311 – electronic community information & engagement platform completed & implemented
 - f. Language Line translations services available to all city departments to improve services to community
 - g. Municipal Code revisions underway – including gender-neutral language
 - h. Host Compliance software implemented – collaboration between City Development, City Clerk & Finance
 - i. Uptown Social building completion (Nov 2022)
- 4. Strategic Plan related
 - a. Strategic Planning in process with Baker Tilly
 - i. 1st Plan that engaged residents for direct input
 - b. Build upon the addition of Diversity/Equity/Inclusion/Belonging initiatives
 - c. Work with community partners for education and advancement of the city's DEIB initiatives
 - i. Lakeshore Technical College – Lakeshore DEI Advisory Council
 - 1. Advisory Council member
 - 2. 2022 Diversity Summit participant
 - ii. Sheboygan County Chamber of Commerce
 - 1. Chambers Board – DEI Assessment participant
 - iii. Sheboygan DEIB – Collective
 - 1. Seeking educational resources for city issues